Getting Started

If you have never used the online system or you are unsure of how to use it, the Research Ethics Office website has help documents or video tutorials that show how to navigate and do various functions in the system.

University of Alberta Faculty Members

You will automatically be given the “Human Research - Principal Investigator” role and the “Supervisor” role in the online system if you are a University of Alberta faculty member.

However, you will need to update your profile per the following instructions: (Video link)

1. Log on to the online system using your CCID and password.
2. Click on your name, located in the top right corner of the screen.
3. Click “My profile”.
4. Click on the “Select View” drop-down menu and select “Edit User Profile”.
5. In the “Department/Employer” drop-down menu, you will see that the Department default is “TEMP”. Change this to your home Department (eg: MH Medicine).
6. Answer “No” to the question at the bottom of the screen “Are you a student/trainee”.
7. Click “OK” to save the changes.
8. Click "Dashboard" (located in the upper left side of the screen) to go back to your personal folder.
9. With the “Principal Investigator” role, you can:
   - Be listed as either the PI (Principle Investigator) or the Co-I (Co-Investigator) in any application.
   - Select the New Human Study button to create a new application.
10. With the “Supervisor” role, you can:
    - Be listed as Supervisor on a student’s ethics application.
    - Review and approve an application when the student submits it, before it goes to the REB for review. See “How to – Supervisor Approval” on our website.
Study Coordinator/Research Assistant

If you are being added to an ethics application as a Study Coordinator/Research Assistant, you will automatically be given the “Study Coordinator” role when you are added to the application.

However, you will need to update your profile per the following instructions: (Video link)

1. Log on to the online system using your CCID and password - the same one you use to log in to your ualberta email.
2. Click on your name, located in the top right corner of the screen.
3. Click “My profile”.
4. Click on the “Select View” drop-down menu and select “Edit User Profile”.
5. In the “Department/Employer” drop-down menu, you will see that the Department default is “TEMP”. Change this to your home Department (eg: MH Medicine).
6. Answer the question “Are you a student/trainee”.
7. Click “OK” to save the changes.
8. Click "Dashboard" (located in the upper left side of the screen) to go back to your personal folder.
9. With the “Study Coordinator” role, you can:
   - View and edit the application, and receive notifications regarding it once you are listed as the study coordinator on the application.
   - Start a new application on behalf of a PI and be listed on a new ethics application as study coordinator
   - Be listed on an existing application(s) by using the "Change Personnel" function in the application. If needed, see “Change Personnel” to add/delete/change personnel.
**Troubleshooting**

**Study Coordinators:** If you are being added to an ethics application, but your name is not showing up on the drop-down menu, then either you do not have an active CCID, or you have never logged in to the system, or you do not have the required role.

a. If you do not have an active CCID, contact reoffice@ualberta.ca

b. If you have never logged in to the system, your profile in the system is not yet active. Log in with your CCID and password, and complete the steps above to update your profile.

c. If you have tried the steps above, and the PI or other study staff already named on the application cannot find your name in the drop-down menu, then you do not have the required role. You will need to “Request an additional role” in the system ([help video can be found here](#)):

   i. Log into the online system and click ![Request Additional Roles](#) to request a “Human Research - Study Coordinator” role.
   ii. Click Continue to move to the second page and answer the four questions.
   iii. Ensure your Department/Employer is correct or select accordingly.
   iv. Click Continue and you will exit the form.
   v. Click ![Submit Request](#) on the left, then click OK to complete the request. You will receive a message right away that the role has been granted*. If you receive a message that your role request was rejected, contact reoffice@ualberta.ca and include a screen shot of the error.

* Note: If you did not receive a granted message, and you do not see the Request Additional Role button on your Dashboard, then it is likely you have not completed the request and it is in a “pre-submission” status. If this happens:

   i. Click on the General tab in your Dashboard.
   ii. Click on the role request that is in "pre-submission".
   iii. Finish the role request per the relevant instructions noted above.
   iv. Submit the request.

If you have any difficulties using the online system, please contact the Research Ethics Office at reoffice@ualberta.ca or 780-492-0459.